New York State Governor's Traffic Safety Committee
eGrants System

Applicant User Guide
Version 2.0
eGrants System

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1. System Requirements

New York State GTSC eGrants was designed so that most computer users will be able to use the system with little or no changes to their computer environment. The four requirements that are mentioned below are common computer elements that should be already present on most machines.

GTSC eGrants system requirements listed below can also be viewed on the system itself by clicking the "review the system requirements" link from the system homepage.

1.a. Operating System

GTSC eGrants was designed for the two most common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing the system from a Macintosh environment are required to have MacOS 7.5 or higher running on a PowerPC processor. Windows users are required to have an operating system that is Windows 95 or higher.

1.b. World Wide Web Connection

GTSC eGrants is an Internet proposal. It is accessed via the Internet and was specifically designed for Internet usage. The Internet is the more general term that is typically used to refer to the World Wide Web. The World Wide Web consists of a vast array of content that is accessible via a web browser. To access GTSC eGrants, the standard Internet connection is via a modem connection. A modem is a piece of hardware that connects to the computer to send data through a phone line to and from the computer. Internet connections that are "faster" than a modem connection, such as cable and DSL, will improve the speed at which the system operates, but are not necessary to use the system. If you are in an office environment, you may already have an Internet connection, but if you are unsure, please contact your organization's network administrator.

For those using a dial-up connection over a modem, it is highly recommended that you have a modem connection speed of at least 33.6 kbps (kilobits per second).

1.c. Web Browser

This system was designed to be compatible with common up-to-date web browsers including Internet Explorer, Firefox, Safari, and Opera.

1.d. Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat Reader choose to view, print, or save these documents. If you do not have Adobe Acrobat Reader you can go to www.Adobe.com and download it for free.

2. GTSC eGrants System Homepage

To access GTSC eGrants, type the URL: http://grants.gtsc.ny.gov/Login2.aspx?APPTHEME=NYDMV into the address bar of the web browser and select ENTER. The login screen should appear as below:

2.a. Browser Configuration

To avoid various browser-related restrictions unnecessarily placed on GTSC eGrants, please make the following configuration changes for the web-browser that you are using.

2.a.1 Internet Explorer

If using Internet Explorer, it is recommended to add the GTSC eGrants homepage to the list of trusted sites. To do this, please complete the following steps:

1) Select "Tools"
2) Select "Internet Options"
3) Select the "Security" tab
4) Select "Trusted Sites"
5) Select the "Sites" button
6) In the "Add this Web site to the zone:" textbox type http://grants.gtsc.ny.gov and then select "Add"
7) Select the "OK" button, and then select the "OK" button again

3. Applicant user types

There are three security roles defined for GTSC eGrants users: Project Director, Fiscal Agent, and Agency Staff. These roles have different security access to work on the proposals. Once the Project Directors are identified and new user accounts are created, the Project Directors will select and enter their own organization's staff to access GTSC eGrants. The organization's staff entered by the Project Directors must be assigned to either the Fiscal Agent or Agency Staff security level role. Each security role is summarized below:

Project Directors will be able to:

- Edit and delete user account information for Fiscal Staff and Agency Staff
- Initiate available grants and apply for grant proposals
- Enter, update and delete information on proposals
- Download and attach files to the proposals
- Cancel an entire proposal before submission
- Submit proposals, for the various proposals available to GTSC eGrants
- Modify proposals within the status of Modifications Required
- Check on the status of each proposal

Fiscal Staff will be able to:

- Edit their own user account information
- Enter, update and delete information on proposals
- Download and attach files to the proposals
- Modify proposals with status of Modifications Required
- Check on the status of each proposal

Agency Staff will be able to:

- Edit their own user account information
- Initiate available grants and apply for grant proposals
- Enter, update and delete information on proposals
- Cancel an entire proposal before submission
- Download and attach files to the proposals
- Modify proposals with status of Modifications Required where permission is granted
- Check on the status of proposals where permission is granted

Security Roles	Control Access to Organization	Control Access to Proposal	Read	Write	Initiate Proposal	Submit Proposal	Cancel Proposal
Project Director	X	X	X	X	X	X	X
Fiscal Staff			X	X			
Agency Staff			X	X	X		X

4. Gaining access to GTSC eGrants

To use the system, an account for the organization must first be granted access to it. There are two basic ways to get access to GTSC eGrants.

1) Request access to the system to be approved by a GTSC eGrants System Administrator

2) Be granted access by someone from within the organization access must be granted

It is recommended that the Project Director for the organization first obtain access by following the procedure under section 4.a. Once the Project Director has obtained access to GTSC eGrants, accounts can be manually added for the remainder of the organization's staff without help from eGrants administrators, as described in section 4.b.

Both processes for gaining access are described below.

4.a. Gaining access through a system administrator

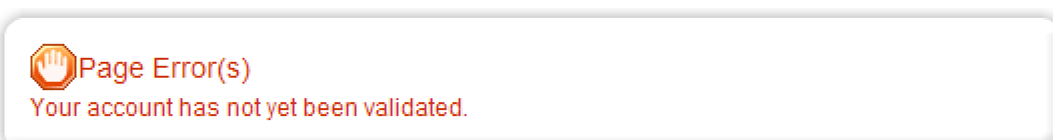
The first time a Project Director uses GTSC eGrants, a new user account must be created.

To create a new user account:

1) From the GTSC eGrants homepage select the "New User?" link located in the "Login" section.
2) Complete the user form in its entirety.
   a) All items marked with an * must be completed to create an account.
   b) The "Username" field must consist of all letters and numbers.
   c) The "Password" field must consist of all letters and numbers and must be at least 5 characters long.
   d) The fields "Password" and "Confirm Password" must be the same.
   e) The person who is to be the Project Director for the Organization completes the page, including Organization and Title. **If Organization and Title is not included, it could delay the process.**
3) Select "Save" to save the new account contact information.

NOTE: Once the Project Director has created a user account and gained access to the system, access does not need to be requested again. There is no need for multiple accounts within GTSC eGrants.

The account must then be approved by an administrator before gaining access to the system. If attempting to access the system prior to being approved/validated by a system administrator, will return the following message:



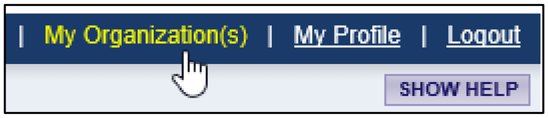
When access has been granted by a system administrator, an email message will be sent to the email provided confirming that the account has been validated.

4.b. Gaining access through another member in your organization

Another option to gain access to the system is to have a Project Director from the organization add a new account into the system. The organization must already be in the system and the existing account must be assigned the Project Director security role.

1) The Project Director must first login to the system.

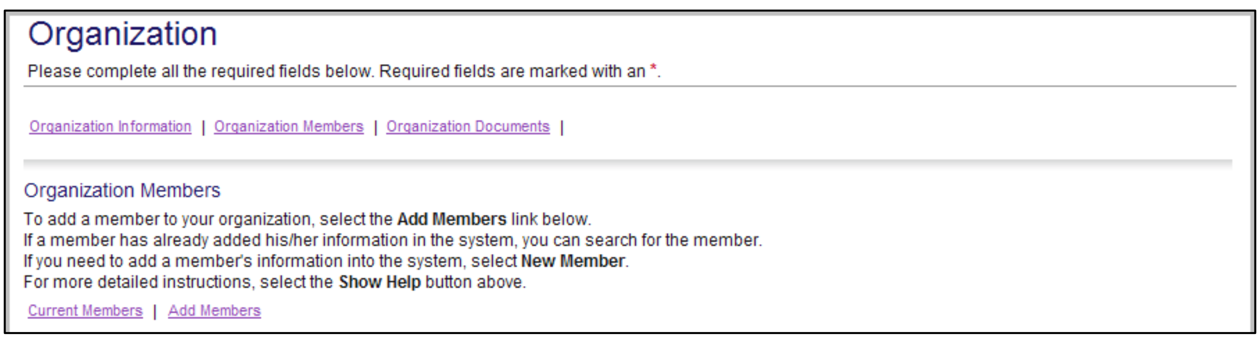
2) From the Main Menu the Organization's Project Director must then select "My Organization(s)" on the menu bar.



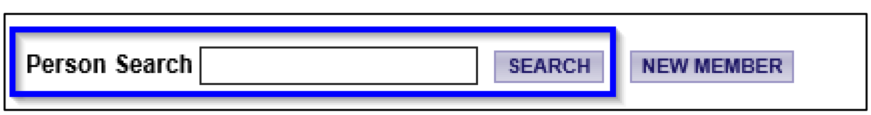
3) Some Project Directors may be members of multiple organizations. Select the name of the organization this new account must be added to. Each organization would be listed here.

4) From the Organization page select the "Organization Members" link.

5) By default, the "Current Members" tab will be active and below it will be listed the various members of the Organization. Select "Add Members" above the Organization Members list.



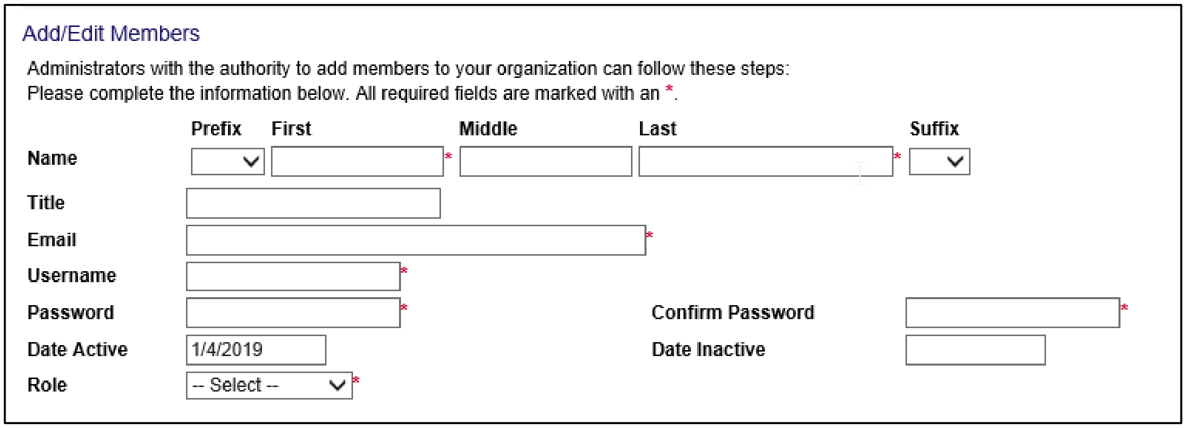
6) Check if the person for the new account exists in the system before creating the new account. Enter the name or partial name in the "Person Search" and select the "Search" button.



7) If the person exists in the system, the account will be shown below the search box. The "Selected" checkbox should be checked and the user must be assigned a role and a start date within the agency. Select the "Save" button to add the account to the organization.

8) If the person for the new account does not exist in the system yet, select “New Member”.

9) Complete the New Member form.



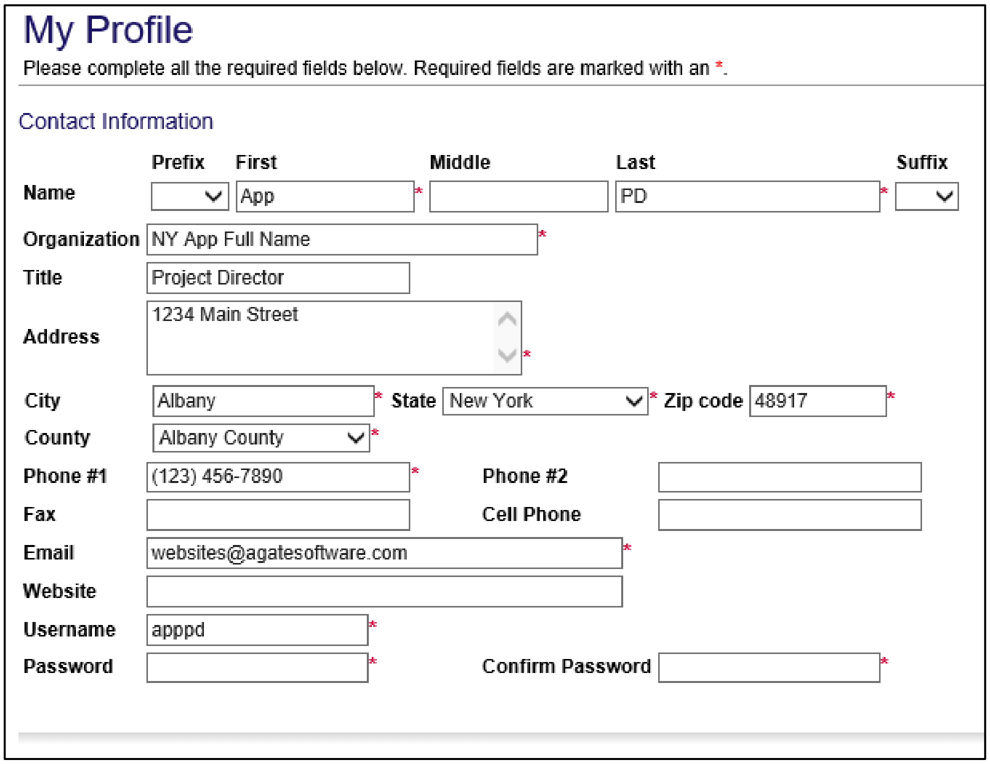
10) When required fields are complete, select “Save and Add to Organization” in the upper right. The person for new account will be sent an email with the username and password needed to login to the system.

5. Keeping contact information current

To receive continued funding or to enter into new grant agreements, it is important that contact information be as up-to-date as possible. This is done very quickly and easily in GTSC eGrants. By keeping user record and agency record current with the latest changes, GTSC eGrants staff must be able to contact you appropriately when the need arises.

5.a. Updating your user record

1) Select "My Profile" on the menu bar on the Main Menu.
2) Update the form accordingly and select the "Save" button in the upper right corner.



5.b. Updating another user's contact record

The Project Director can update contact information for members within the same organization.

1) Select the "My Organization(s)" link on the menu bar and select the organization for the member to edit.
2) Select the "Organization Members" tab.
3) Select the name of the person whose contact information must be updated.
4) Update the form accordingly and select the "Save" button in the upper right corner.

NOTE: A Project Director may not change the contact information of another Project Director. If a Project Director were to select another Project Director's name, they would receive an email prompt instead of seeing their contact information.

5.c. Updating the information for your agency

Although it doesn't occur frequently, when an organization's contact information changes it is important to update that information in the system by following these steps:

1) Select the "My Organization" link on the menu bar.
2) Select the Organization that must be updated.
3) Update the form accordingly and select the "Save" button.

5.d. Deactivating a user in the Organization

A Project Director from an organization may choose to deactivate a member of the organization. A deactivated user will not be able to edit proposal related information for your organization. You may deactivate a member of your organization by following these steps:

1) Select the "My Organization" link on the menu bar.
2) Select the name of the Organization whose member needs to be deactivated.
3) Select the Organization Members tab.
4) Update the second active date in the system to a date in the past for the user requiring deactivation and then select the "Save" button.

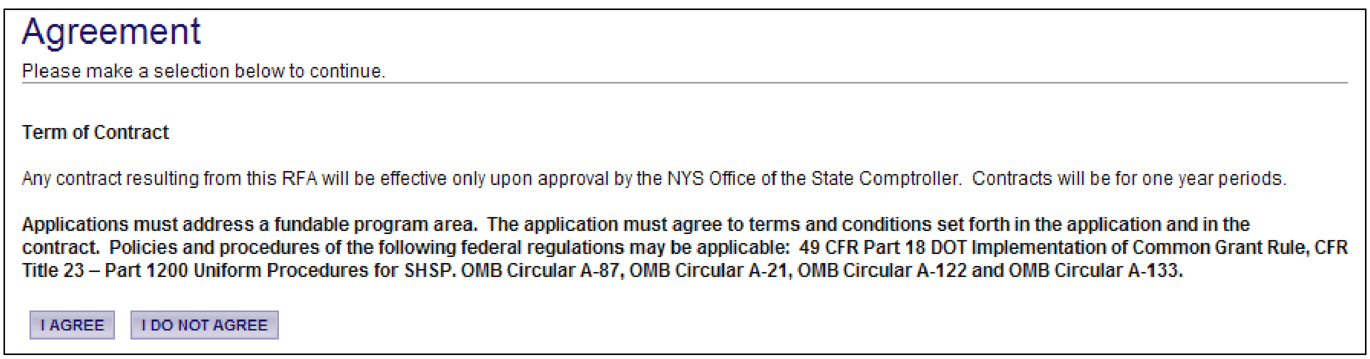
6. Initiate a Proposal

The Project Director and Agency Staff security roles are permitted to initiate proposals. After the proposal is initiated, the work may also be turned over to a Fiscal Staff at the discretion of each applicant. To create a proposal, please follow these steps:

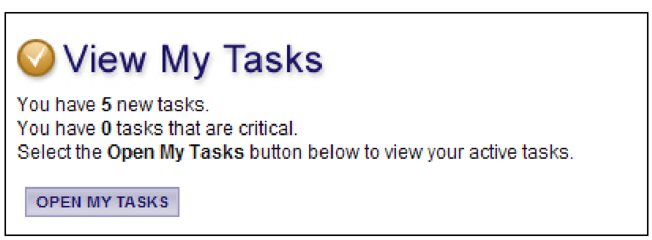
1) From the Main Menu, click the "View Opportunities" button under the "View Available Opportunities" section on the main menu. This section will show you all of the grant program types where you may apply for a new grant.

For those grant programs where you are eligible to submit a new proposal you will see a "Apply Now" button under the description of the grant. Click the "Apply Now" button.

A confirmation page will appear asking for confirmation. You must read the Terms and Conditions and by clicking the "I Agree" button you accept those conditions. A proposal will be created and you will be taken to the "Proposal Menu" where you can begin filling out the pages.



Following the creation of a proposal, a new task for that program will be under the "View My Tasks" section on the main menu. All proposals for your organization will be shown under the "View My Tasks" section. When logging into GTSC eGrants, click the "Open My Tasks" button to return to any proposal or grant initiated by your organization.

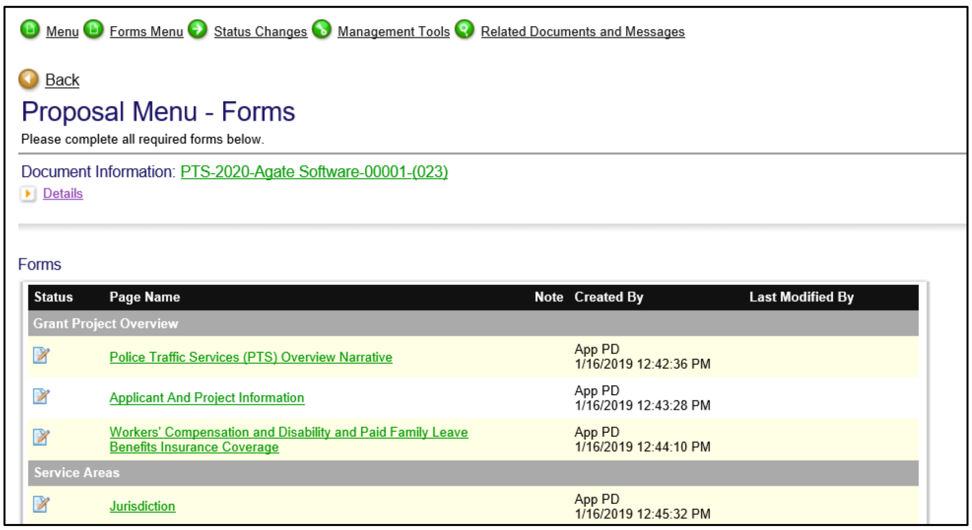


7. The Proposal Menu

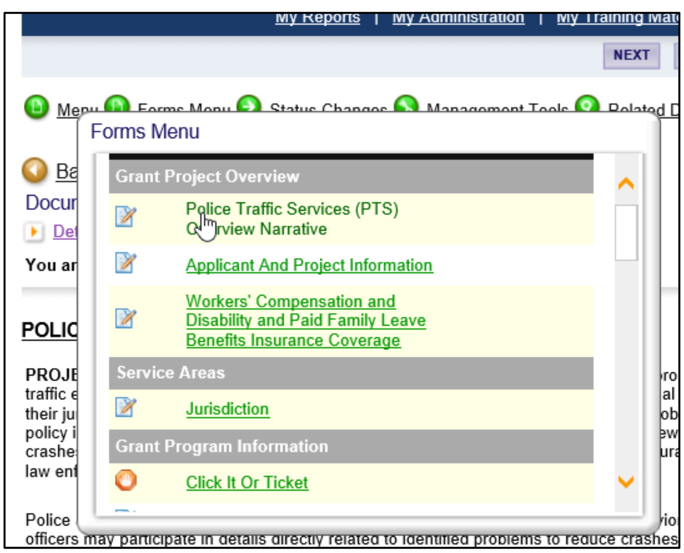
The Proposal Menu is organized into various sections that help to organize the proposal tasks and information. These sections are described below.

7.a. Forms Menu

The Forms section is where most of the work in a proposal is completed. This section contains a list of the forms that are necessary to complete prior to the proposal being submitted. To edit a proposal form, select the name of the form in the "Page Name" column.



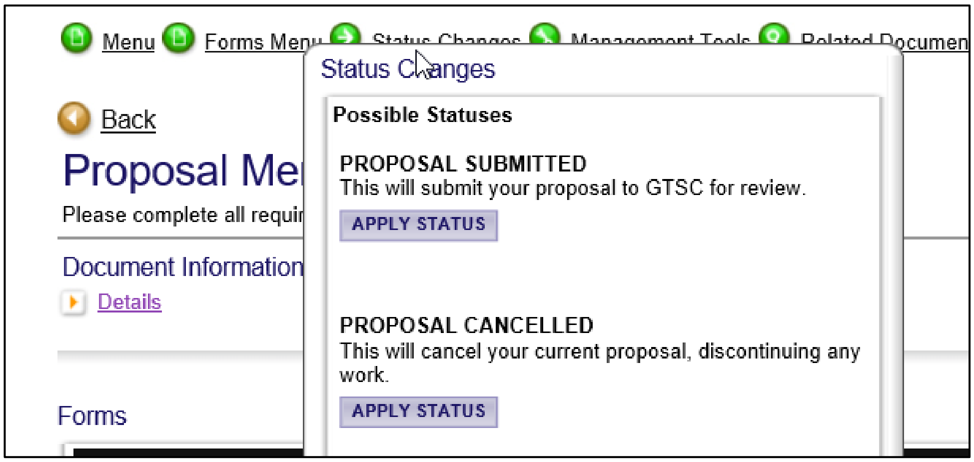
To navigate to a different form once in a form, hover over the "Forms Menu" link in the menu to view the list of forms and select the next form to be completed.



Selecting the "Next" button on the page will navigate to the next page, in the order of the forms listed on the Forms Menu.

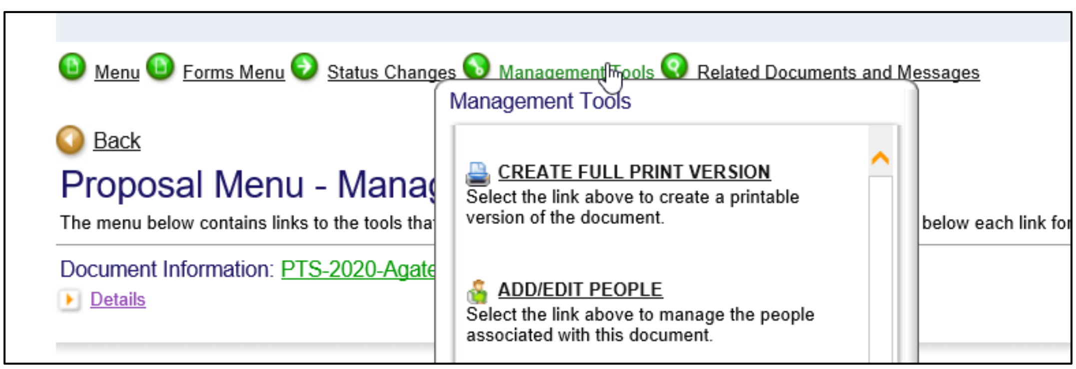
7.b. Status Changes

The "Status Changes" section allows a Project Director the ability to submit proposals or push the proposal to the next status level. Select the "Status Changes" link or hover over the "Status Changes" link to see what status options are available. To change the status, select "Apply Status" under the status option that the proposal must be pushed to.



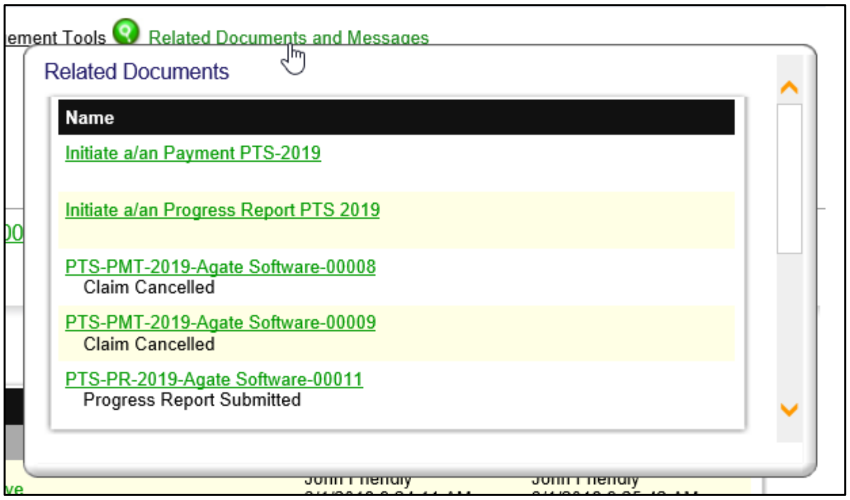
7.c. Management Tools

The Management Tools section allows a Project Director or Fiscal Staff person certain administrative responsibilities such as the ability to add/edit people from the proposal and view the status history of the proposal. Select the "Management Tools" link or hover over it to view the list of available tools and access the tool that needs to be used.



7.d. Related Documents and Messages

The Related Documents and Messages section is where you will find items that are related to a proposal or grant. An example of a related item would be a Progress Report or a Payment Request. It is likely you will not have any related items until later in the grant cycle.



8. Assigning Users to a Proposal

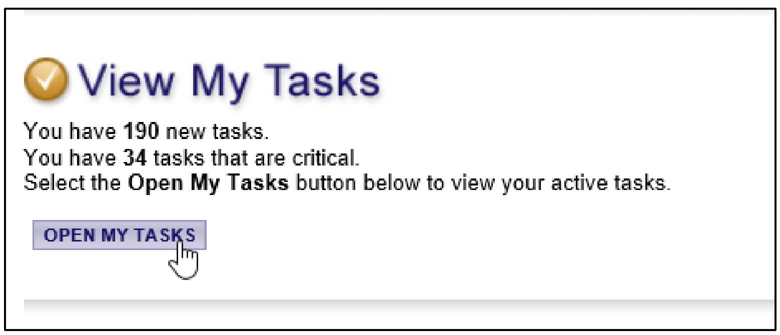
The Project Director has administrative rights to add or remove Fiscal Staff or Agency Staff to proposals. The Fiscal Staff can also add Agency Staff. Users with the Agency Staff security role can assist the Project Director and Fiscal Staff with completing the forms in the proposal and may add additional Agency Staff members.

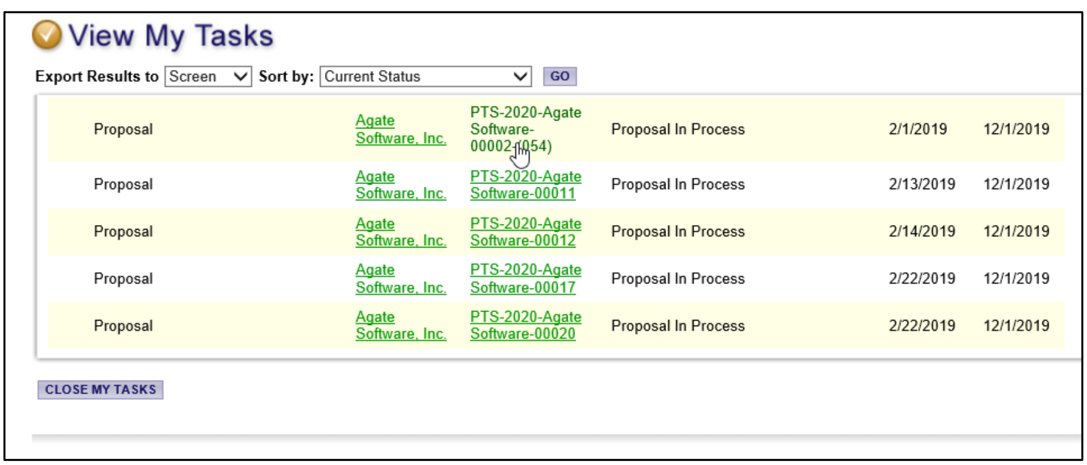
Members of consulting firms are commonly added to proposals by the Project Director as Agency Staff members. The role assigned to a consultant is decided by the Project Director of the organization filling out the proposal. It is recommended that consultants be given the Agency Staff security role, but this is not a requirement.

Any Project Director or Fiscal Staff that is a member of the organization that is applying for a grant will automatically be added to that proposal when the proposal is first created. Any Project Director, Fiscal Staff, or Agency Staff member who is added to the proposal will also be automatically added to all corresponding Progress Reports and Payment Requests when each is created. New users to GTSC eGrants will not be automatically added to existing proposals. However, any user may be manually added to the proposal throughout the entire proposal completion process.

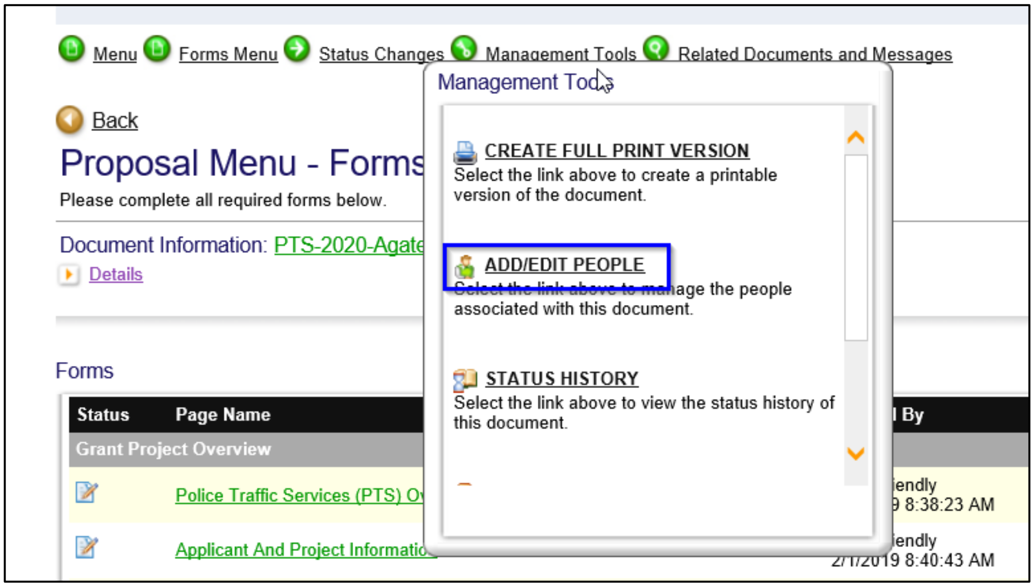
8.a. Assign User Access to Proposal

1) To add Agency Staff to a proposal, the Project Director or Fiscal Staff must select the proposal in the "My Tasks" Section on the "My Home" page.

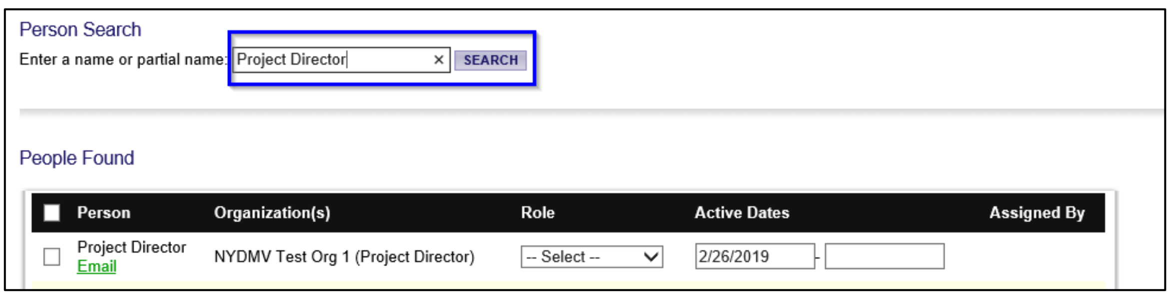




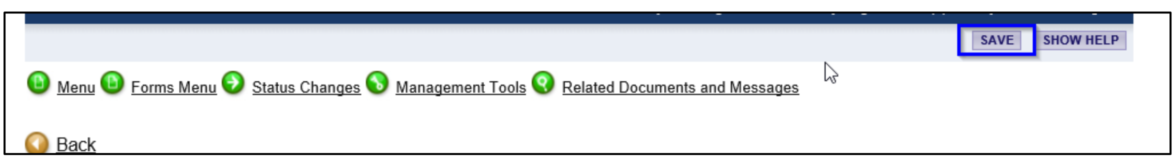
2) Select the “View Management Tools” button, or hover over it, and choose the “Add/Edit People” link.

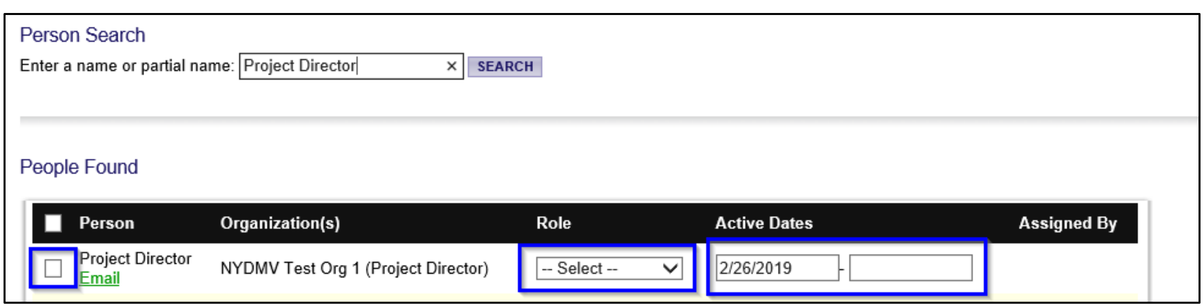


3) Type in the name of the person in the search criteria box and select the “Search” button.



4) From the search results, select the user, select a security role, and complete the access date needed for this user to access the proposal. Select “Save” in the upper right to add the person.



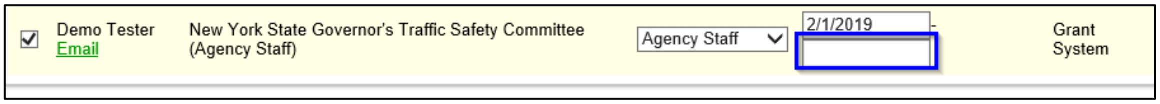


8.b. Remove User Access to Proposal

There are two ways to remove a user's access to a proposal.

1) To remove a user's access to a proposal, on the proposal menu click the "View Management Tools" button and then choose the "Add/Edit People" link.

2) Edit the access start and/or end date for the user. Give the user an end date to remove access within a specific timeframe. After changes are made, select "Save" in the upper right.



Another option to remove access:

3) For the desired user, in the "Selected" column, disable (uncheck) and save the page. The user will be removed from the page.

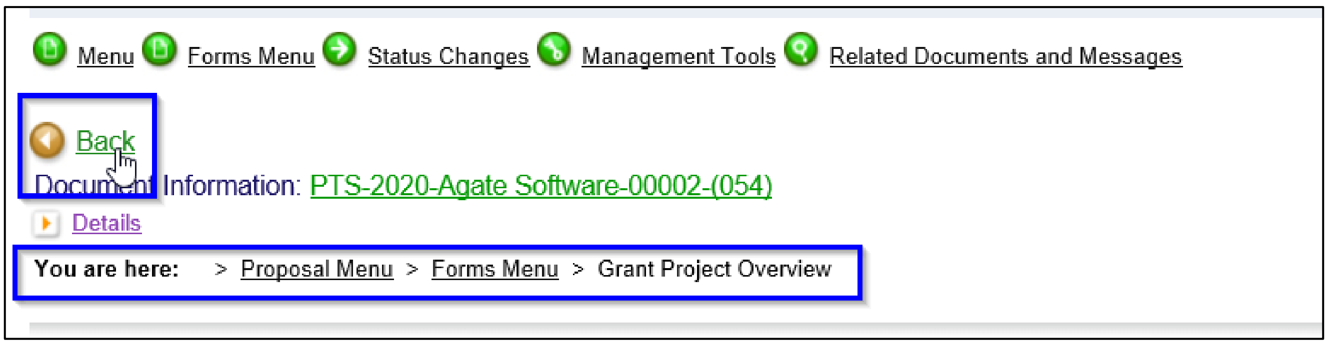
9. Proposal Form Completion

When accessing a proposal, the Forms Menu will be displayed upon agreement after initiation. These are the forms that must be completed before your proposal can be submitted. The following sections will lead you through the steps necessary for accomplishing that goal.

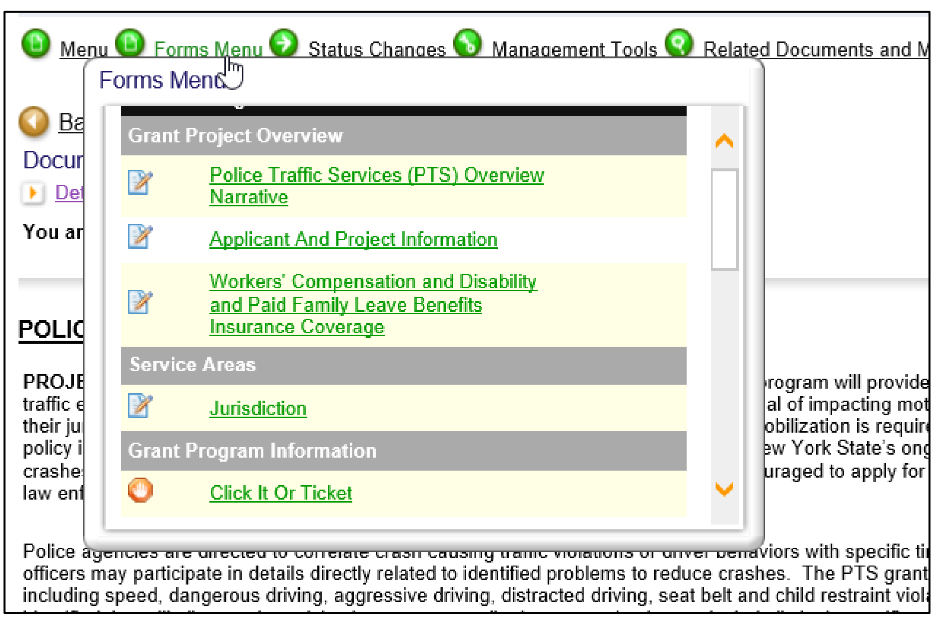
9.a. Forms Navigation

There are three basic methods for navigating through the forms of your proposal. You may either use the "Back" link at the top of any page within the proposal, the breadcrumb links just below the "Back" link, or hover over the "Forms Menu" link to view/access any form of the proposal.

By clicking the "Back" button, or the "Forms Menu" link in the "You are here" breadcrumbs, you will be taken back to the Forms Menu and you can select the next page that must be completed. You do not have to complete the pages of the proposal in any particular order. You are able to go back to a previous page to edit or complete the form.

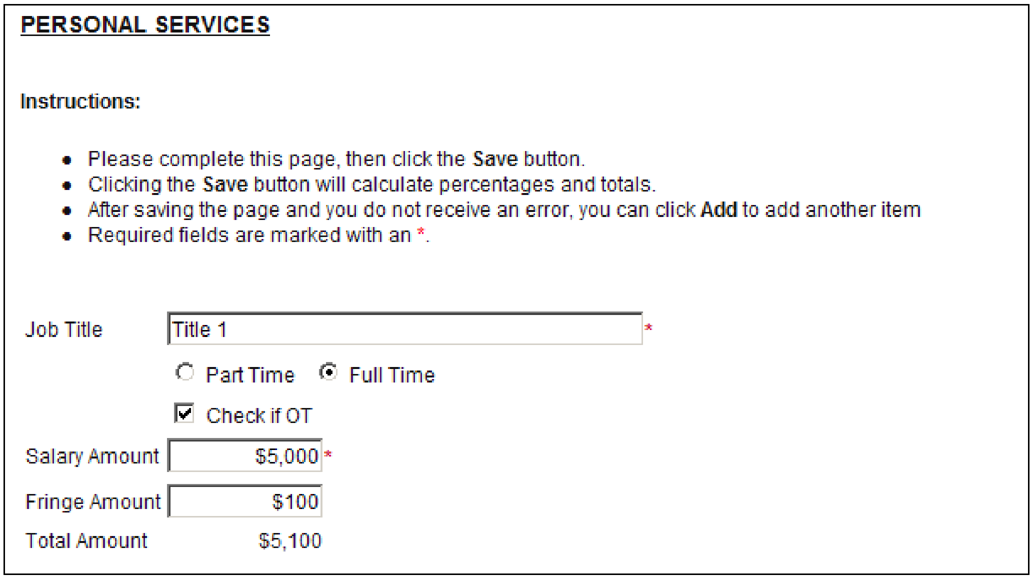


Hovering over the "Forms Menu" link of the menu displays a list of the forms in the Forms Menu without having to wait for the Forms Menu to load. Quickly access any form within the proposal by hovering over "Forms Menu" and selecting the page that must be completed.

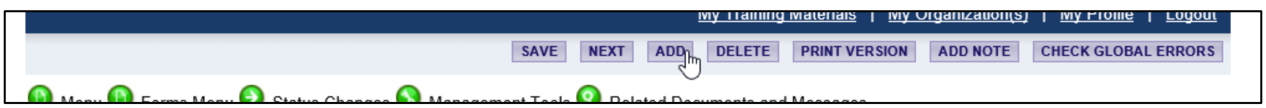


9.b. Form Completion

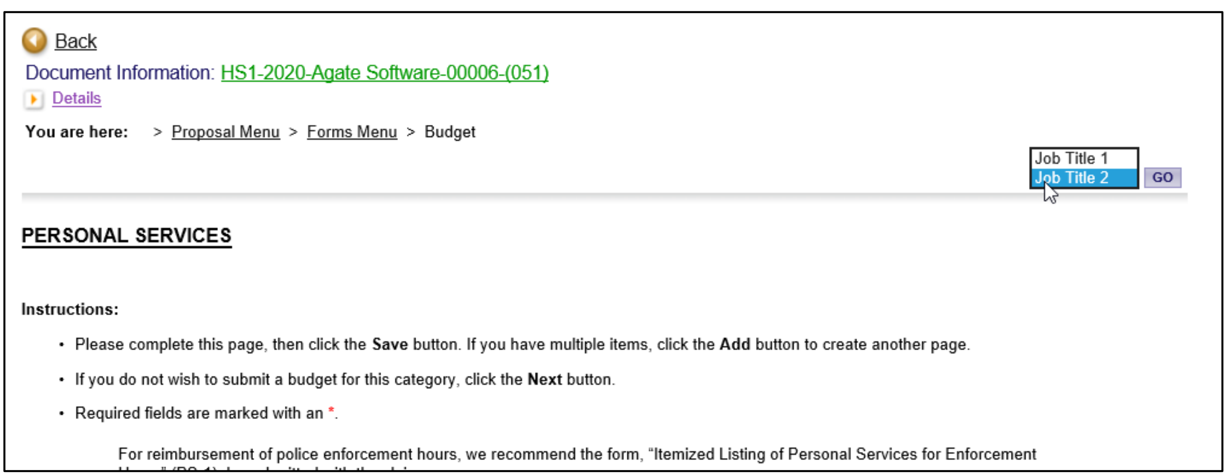
When completing a proposal form, first complete as many of the fields that can be completed. Not everyone in each organization will have the entire information necessary to complete each form. Complete as much as possible and select the "Save" button. Fields followed by red asterisks are required fields.



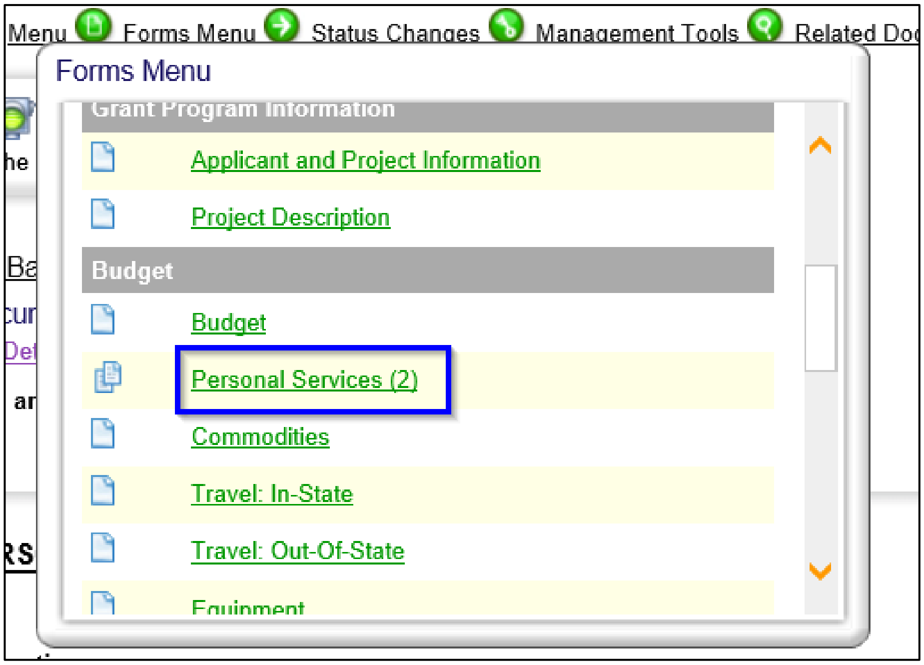
The "Add" button may be used to create additional forms for some types of forms. Any form that has an "Add" button can have multiple instances of that form.



When multiple pages have been created for a form, a dropdown will appear on the far right of the button toolbar.

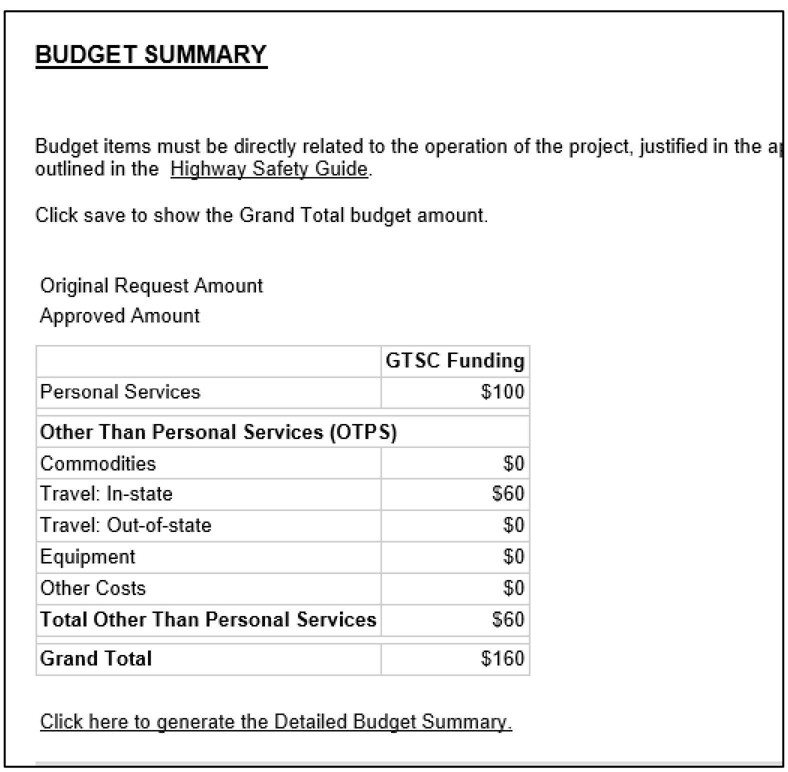


When additional pages have been created, a number in parentheses will appear after the form name to indicate the number of instances that exist for that form.



9.c. Automatic Calculations

When possible, GTSC eGrants will automatically calculate totals. The "Budget Summary" page is a good example of this. When the page is saved the system will take the values that have been entered in the budget pages and display them on the Budget Summary page. The system will sum those numbers to give a Grand Total.



BUDGET SUMMARY

Budget items must be directly related to the operation of the project, justified in the a
outlined in the Highway Safety Guide.

Click save to show the Grand Total budget amount.

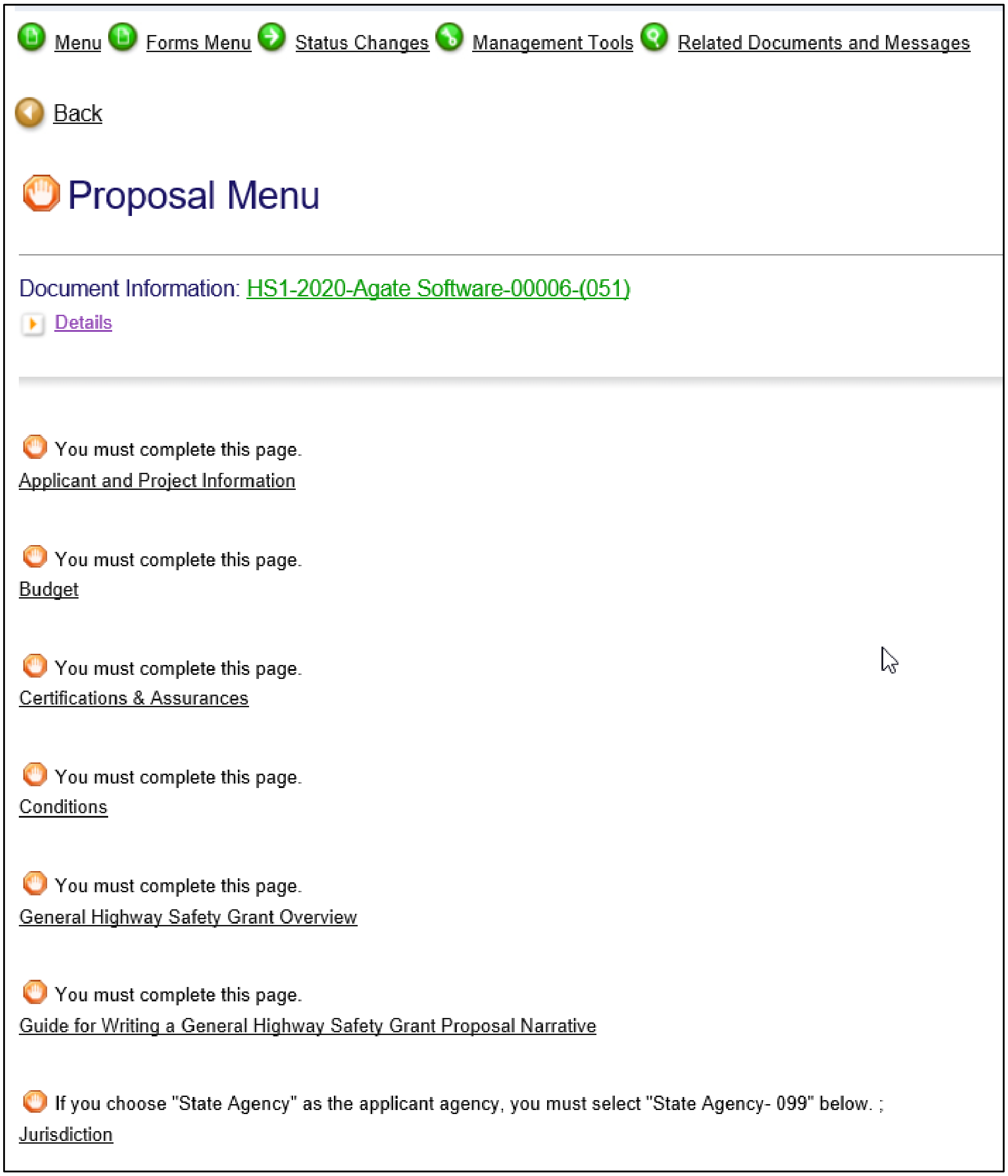
Original Request Amount
Approved Amount

	GTSC Funding
Personal Services	$100
Other Than Personal Services (OTPS)	
Commodities	$0
Travel: In-state	$60
Travel: Out-of-state	$0
Equipment	$0
Other Costs	$0
Total Other Than Personal Services	$60
Grand Total	$160

Click here to generate the Detailed Budget Summary.

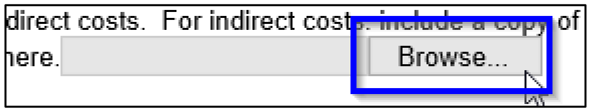
9.d. Error Messages

If any required field is not completed within a proposal form or there are business rules violated, an error message will be displayed in red across the top of the page after the Save button is clicked. During form completion it is not necessary to correct errors right away. Returning to the form later to fix errors is always an option. If for some reason any errors remain or required pages are not complete and submission is attempted a list of the errors will return. GTSC eGrants will require the errors to be fixed before the proposal submission is possible. See the example below.

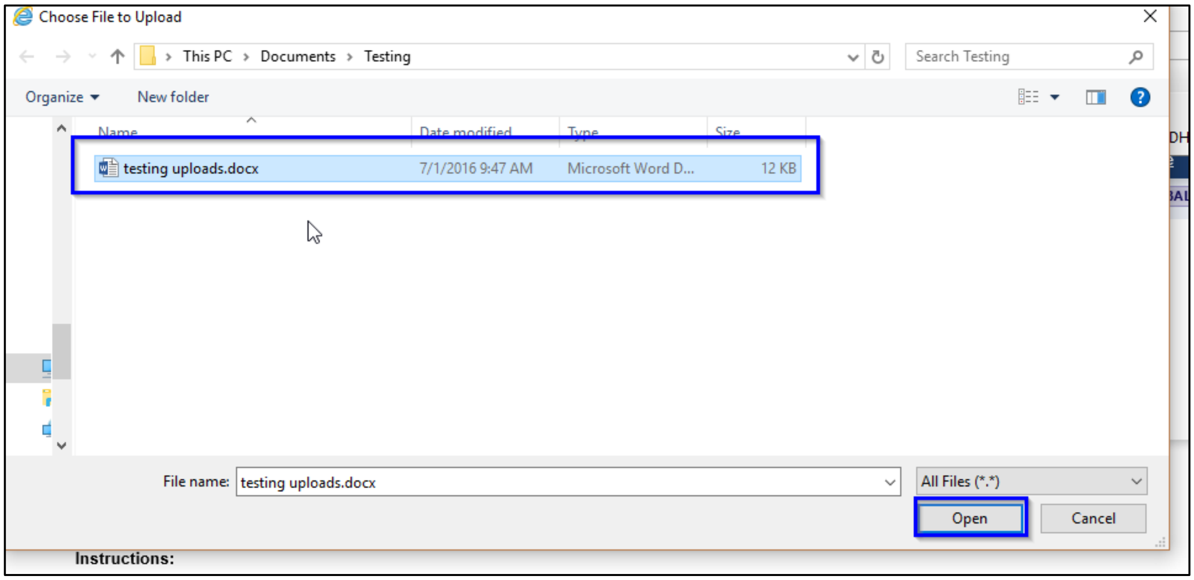


9.e. Uploads & Attachments

For some pages, form fields are not enough to capture the type of information that may be required. In those situations, a file upload field may be provided to allow you to upload a file instead. Files of the following types are allowed as uploads, bmp, doc, docx, gif, jpg, pdf, png, ppt, tif, txt, wpd, xls and xlsx. To upload a file, click the "Browse" button.



Browse to the folder that contains the file you would like to upload and either double-click the file or select the file and select the "Open" button.



Select the page "Save" button in the upper right to save the uploaded file.

A link to the uploaded file will appear below the "Browse" button when the file has been successfully uploaded.

9.f. PDF Version

In many pages a "Print Version" button will be available that will automatically create a PDF print version with the data that was provided for each form. These dynamic PDF's can be printed or saved for reference. It is a good practice to review the PDF files for accuracy prior to submitting the proposal electronically.

9.g. Copy and Paste

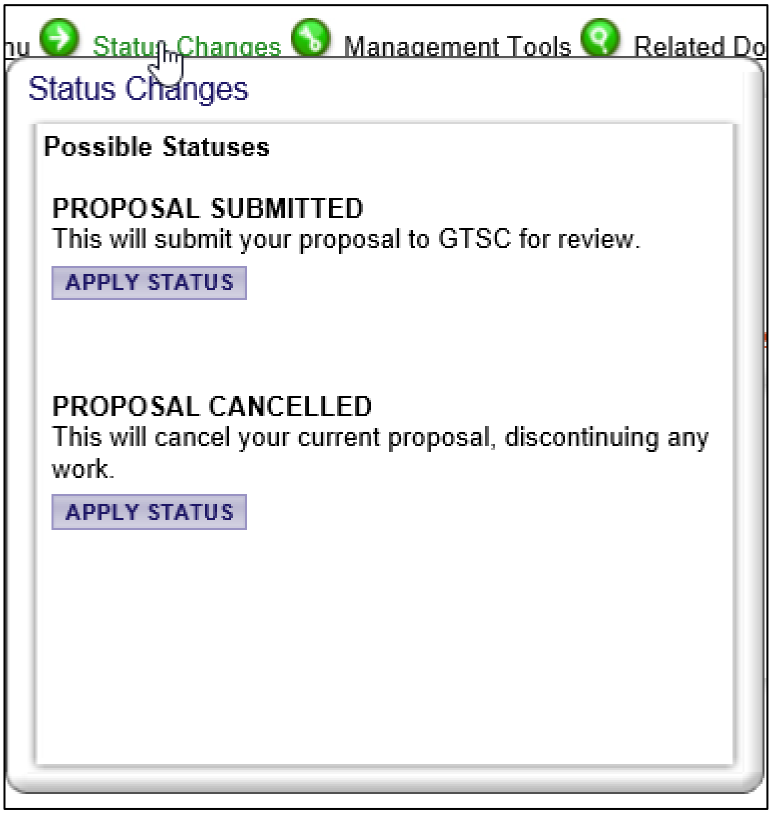
Applicants should be cautious while utilizing the copy and paste function of most word processing programs to transfer text into narrative boxes within GTSC eGrants. GTSC eGrants will not recognize certain formatting, including tables, graphs, photographs, bullets, and certain tabs. Applicants must also be aware of the character limits of each text box, as attempting to copy and paste text that is larger than the allotted amount of space will yield an error. The character limit may be found at the bottom left of each text box. Applicants may want to first copy and paste text into any standard "notepad" (or equivalent) program, which will have similar formatting to the text boxes in GTSC eGrants.

10. Submitting your Proposal

The Project Director security role is the only role authorized to submit a proposal. When the proposal is believed to be complete and no more changes are required, the Project Director may choose to submit.

It is important to note that once a proposal is submitted it will be entered into a read-only status and cannot be changed!

To submit, the Project Director must select or hover over the "Status Changes" button in the proposal's menu. A list of the possible status changes will be shown on this page. Select the "Apply Status" button under the appropriate status change.



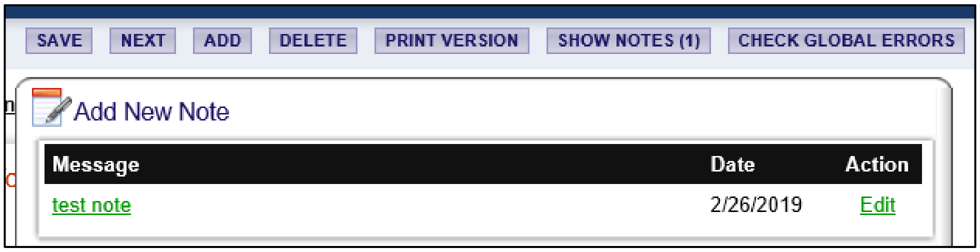
If errors exist on any of the proposal's forms when the Project Director attempts to submit, a global errors list with each error message will appear. The link for the page will be available for redirecting to the form(s) with errors. All errors must be fixed before GTSC eGrants will allow a proposal to be submitted. If no errors exist, the Project Director will be prompted to confirm submission.

11. Notes

GTSC eGrants allows for proposal forms to have notes attached to them. These notes may be used to communicate to other organization staff members or to GTSC eGrants staff who are assigned to the proposal. The example below displays the Notes feature.

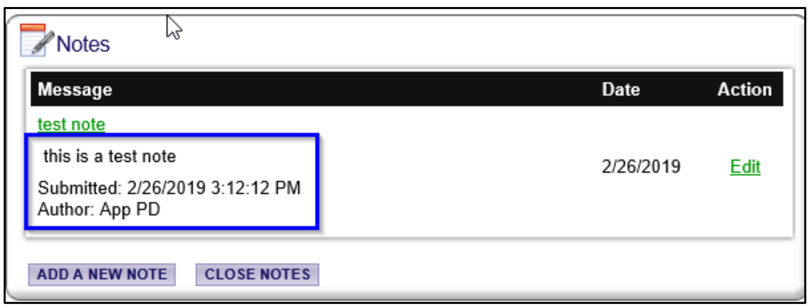
11.a. Adding and Editing Notes

1) Click on the "Add Note" button, or "Show Notes" if there are existing notes.

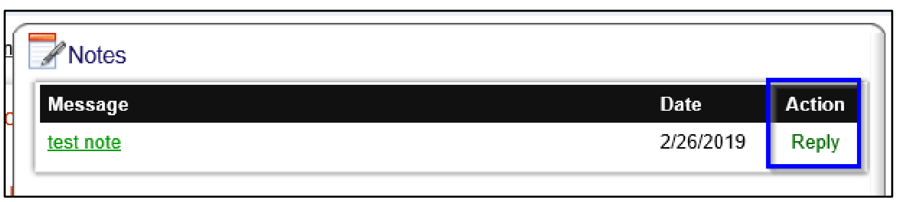


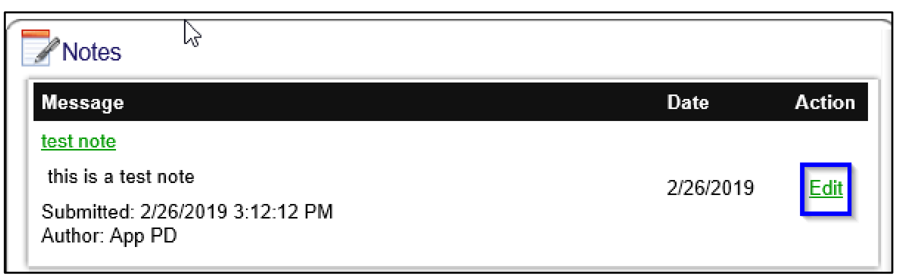
2) Any existing notes will be shown at the top of the new window.

   a) Each note has the following information: message name, author, date, and action.
   b) By clicking on the message name, the note will expand showing the entire note's message.

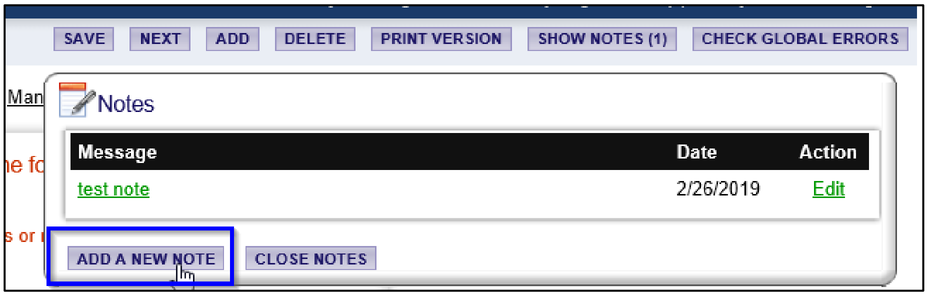


   c) By clicking on either reply or edit under the action column, a note may either be replied (by another user) or edited (by the user who created the note).

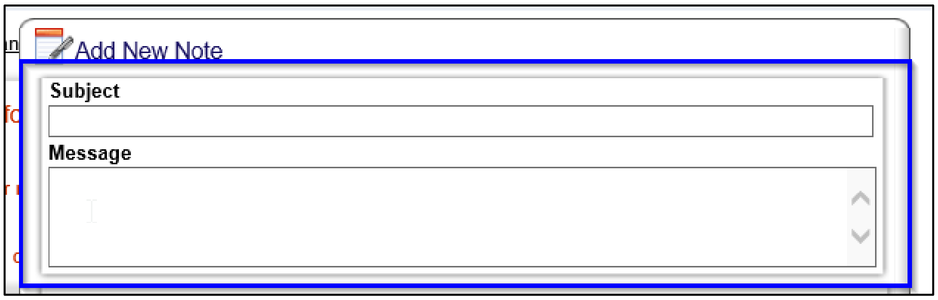




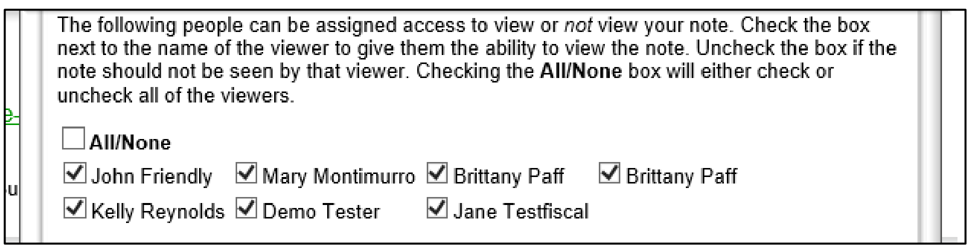
3) To add a new note:
   a) Select the "Add a New Note" button.



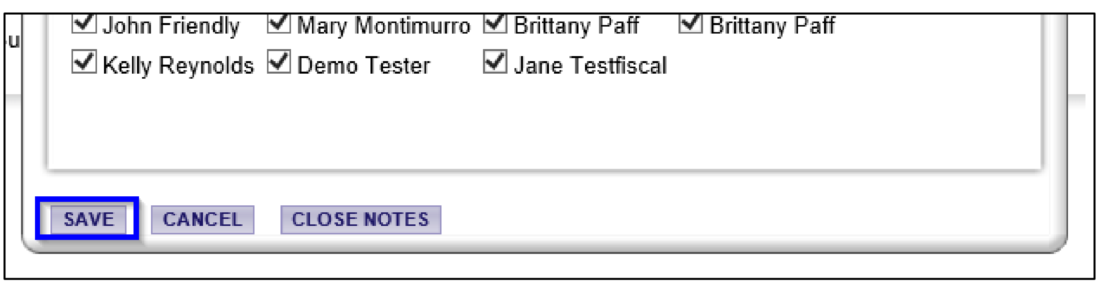
   b) Enter the subject and message.



   c) Select the user(s) the note is meant for and select save. It is important to remember that the author of the notes determines who can and cannot see their note.



4) Select the "Save" button.



5) Select "Close Notes" to close the notes section.

Notes are an informal method of communication. Any text saved into a note will not be displayed on a PDF and will not be part of the review process.

12. Automatic e-mail notifications

12.a. Automatic E-mail Notifications

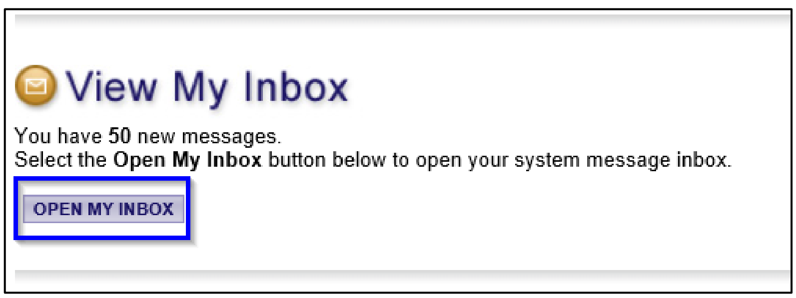
Automatic email notifications may be sent periodically throughout the grant year. These messages will be sent via the system according to an automatic process or as the result of a user triggered event. These messages might accompany the submission of a proposal, a proposal being sent for modifications or a pending due-date that is approaching. These messages are intended to help increase awareness of what is occurring in the system that pertains to the user or user's organization of a proposal. These messages may also be sent by GTSC eGrants personnel. These messages are designed to help keep the organization up-to-date with the progress of the proposal while also serving as reminders when action is required.

To receive these messages, it is important that to include an active, frequently used email address when creating contact records in the system. If an incorrect email address or an address to an account that is either inactive or full is provided, that user will not be able to receive these important messages.

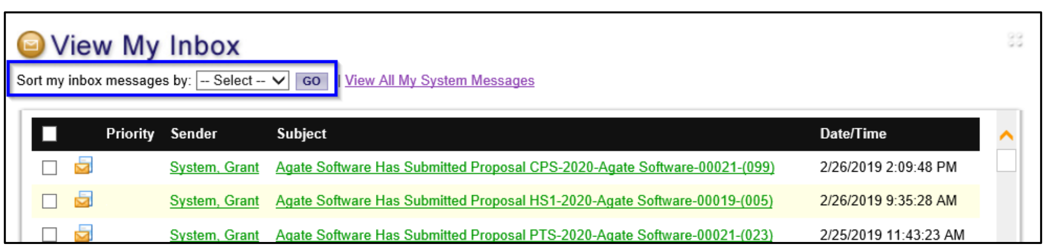
12.b. System Messages

In addition to the automatic email notifications, there is an area referred to as the System Messages that manages messages sent to the user's account, either from the system itself or from GTSC eGrants personnel. View or edit these System Messages by following these steps:

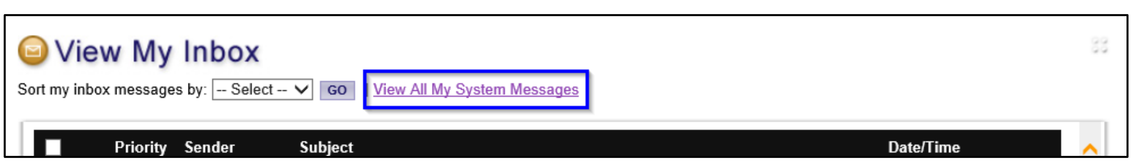
1) Select the "Open My Inbox" button under the "View My Inbox" section on the main menu.



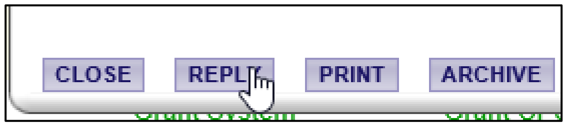
2) Unread system messages will be listed here. Filter system messages by choosing an option from the "Sort my inbox messages by:" dropdown.



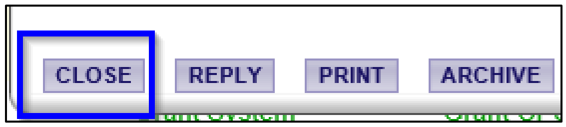
3) Select "View All My System Messages" to search through all messages sent to the account.



a) Select the Subject of a message to view the contents of the message.
   (1) If the message was sent from another user account, select the "Reply" button to reply to the system message. If the message was received from the eGrants system, reply is not an option.



   (2) Select the "Close" button to close the system message.



   (3) Select "Archive" to move the message out of the inbox and retain a copy of it in the archive folder.